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Everest Group PEAK Matrix® for Microsoft Azure System Integrators 2021

Focus on Wipro
December 2020

Everest Group
PEAK MATRIX®

Introduction and scope

Everest Group recently released its report titled [System Integrator (SI) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2021](). This report analyzes the changing dynamics of the Microsoft Azure public cloud landscape and assesses system integrators across several key dimensions.

As a part of this report, Everest Group updated its classification of 26 system integrators on the Everest Group PEAK Matrix® for SI capabilities on Microsoft Azure Services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of Microsoft Azure system integrators based on their absolute market success and delivery capability.

Based on the analysis, **Wipro emerged as a Leader**. This document focuses on **Wipro's** SI capabilities on Microsoft Azure and includes:

- Wipro's position on the SI capabilities on Microsoft Azure Services PEAK Matrix®
- Detailed Microsoft Azure services profile of Wipro

Buyers can use the PEAK Matrix® to identify and evaluate different system integrators. It helps them understand the system integrators' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix® is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements and match them against system integrator capability for an ideal fit.

Background of the research

- Enterprise consumption of cloud has witnessed a dramatic shift, from a skeptical outlook towards public cloud to going all in on public cloud, in the last few years. More than 90 percent of enterprises already leverage one or public clouds in their enterprise environment

- COVID-19 has further accelerated enterprise migration to public cloud as most enterprises could see clear business continuity benefits during the pandemic. Contrary to an expected slowdown due to COVID-19, most enterprises have accelerated their digital transformation efforts with migration to public cloud being a key transformation lever

- Microsoft Azure, with its full stack of offerings across workplace, enterprise IT applications, IT infrastructure, data & analytics, business applications, and collaboration tools, along with its strong existing relationship with enterprises, is becoming a preferred public cloud provider. Rapid adoption of Azure offerings in the market coupled with management complexities and talent crunch is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the Azure landscape across infrastructure, platform, data, and next-generation technology segments

- In this research, we provide an assessment of 26 Azure cloud system integrators featured on the SI capabilities on Microsoft Azure PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over 2020, interactions with Azure cloud system integrators, client reference checks, and an ongoing analysis of the cloud services market.

This report assessed the following 26 system integrators on Microsoft Azure PEAK Matrix® Assessment 2021:

- **Leaders**: Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders**: Brillio, Cloudreach, Coforge, Ensono, GFT, LTI, Microland, Mindtree, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, UST Global, and Virtusa
- **Aspirants**: Aspire Systems, Blazeclan Technologies, Coretek, and Zensar

Scope of this report:

Geography
Global

System integrators
26 leading cloud system integrators

Services
Cloud services

System Integrator (SI) Capabilities on Microsoft Azure Services PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro

- Leaders have established successful businesses in Azure services, driven by capability building and experience across the infrastructure, platform, data, and next-generation capabilities
- These players continue to proactively drive investments in next-generation technology themes and build strategic roadmaps for Azure services (internal IP/tools, partnerships, and acquisitions)
- Leaders have a strong focus in driving alignment between the business and IT teams of enterprises to derive higher value through contextual solutions tailored to specific enterprise requirements
- All Leaders have a strong focus on driving large-scale / complex cloud transformation, specifically for the large enterprise segment (with annual revenue greater than US$5 billion)

Major Contenders:

Brillio, Cloudreach, Coforge, Ensono, GFT, LTI, Microland, Mindtree, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, UST Global, and Virtusa

- Major Contenders in the Azure services space include born in the cloud system integrators as well as Indian-heritage system integrators
- While global players strongly leverage/include their assets and datacenter footprint along with their Azure services offerings, "asset-light" providers leverage their partner technology ecosystem to provide these services
- These companies continue to invest aggressively in building their IP, partnership ecosystem, and delivery capabilities across the Azure services spectrum, as well as in increasing their global coverage
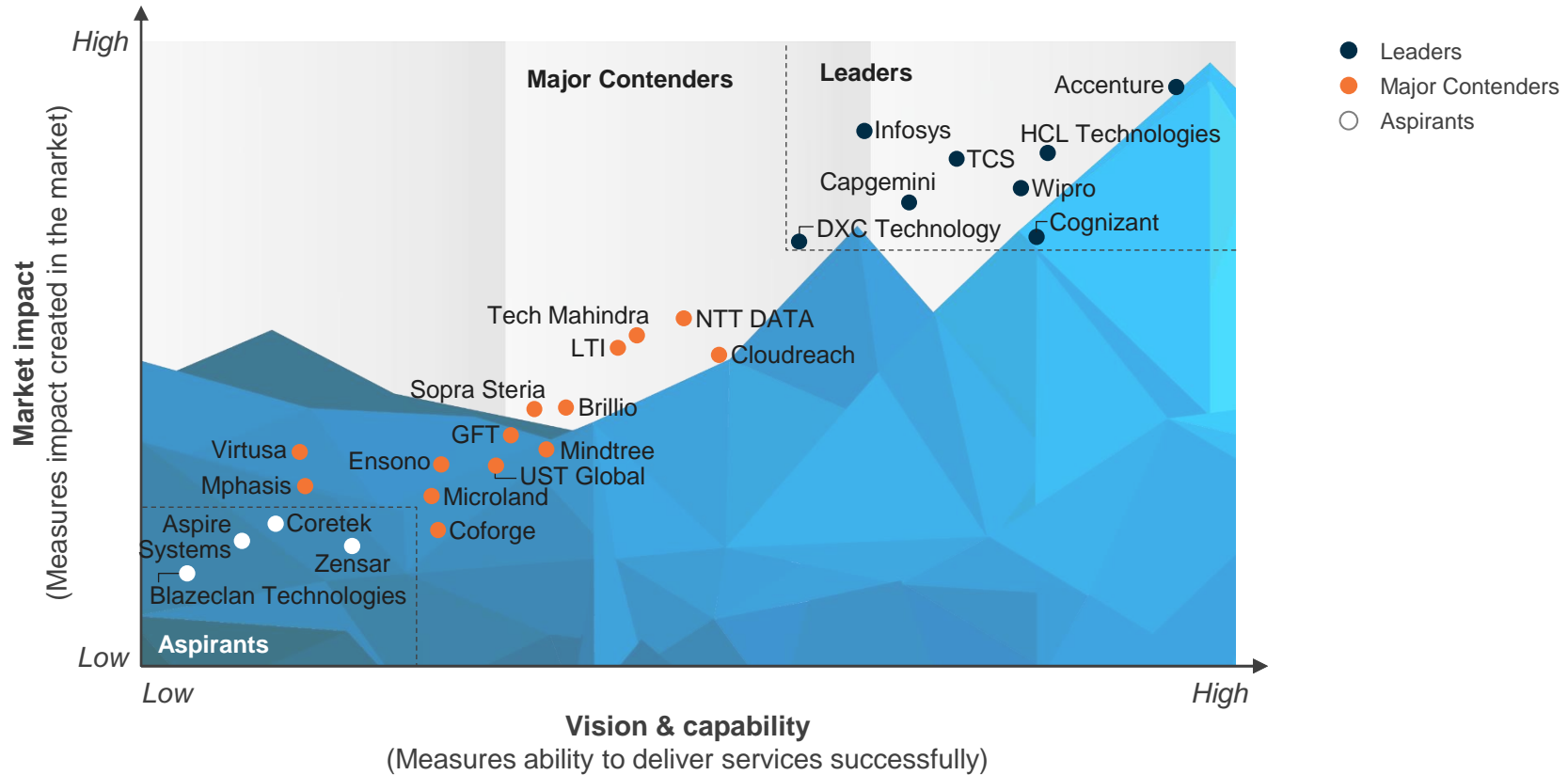
Aspirants:

Aspire Systems, Blazeclan Technologies, Coretek, and Zensar

- The Azure services business of Aspirants is in the initial stages of asset and capability maturity
- While these system integrators are making investments to build delivery capabilities and IP/tools, they will also need to develop and strengthen advisory and design services capabilities on Azure to build market awareness and credibility as strategic transformation partners for enterprises

Everest Group PEAK Matrix®
System Integrator (SI) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2021 | Wipro positioned as Leader

Everest Group System Integrator (SI) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2021

Source: Everest Group (2020)
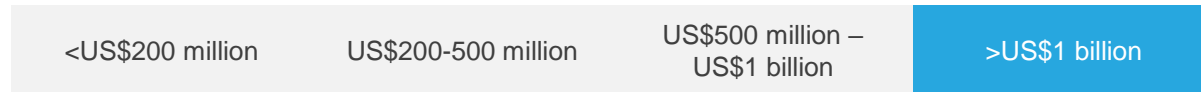
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Wipro | system integrator capabilities on Azure (page 1 of 5)
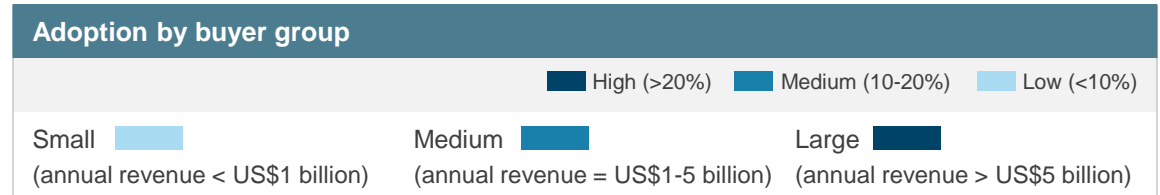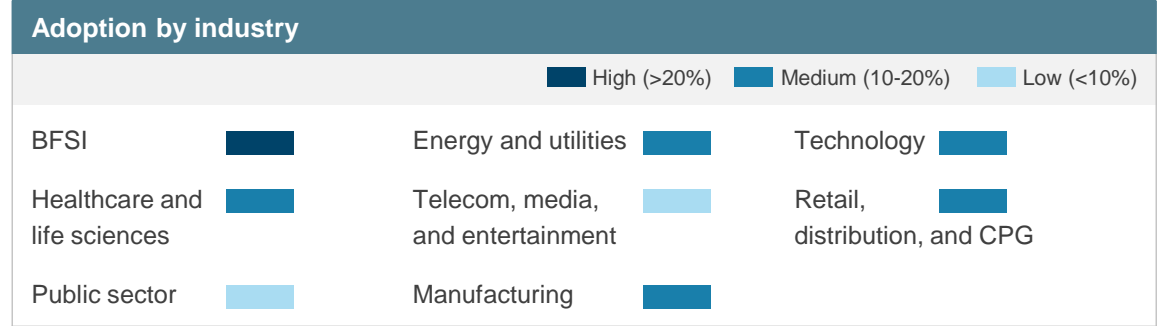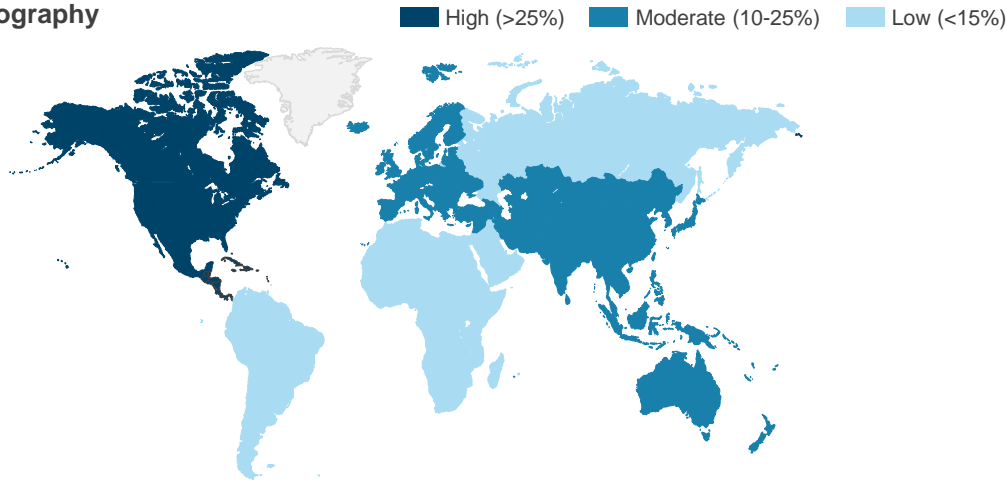## Overall cloud services overview

Cloud services vision:

Wipro's vision is to be a preferred partner of choice for global enterprises and accelerate its business transformation by providing full stack cloud services such as IaaS, PaaS, CaaS, and SaaS. It takes a business-first and cloud-led strategy to serve enterprise needs from the edge-to-cloud across vertical domains, delivered through industrialized and automated platforms.

Overall cloud services revenue (2019)

<US$200 million	US$200-500 million	US$500 million – US$1 billion	>US$1 billion

Adoption by geography   High (>25%)   Moderate (10-25%)   Low (<15%)

Adoption by industry

High (>20%)   Medium (10-20%)   Low (<10%)

BFSI	Energy and utilities	Technology
Healthcare and life sciences	Telecom, media, and entertainment	Retail, distribution, and CPG
Public sector	Manufacturing	

Adoption by service segments

High (>20%)   Medium (10-20%)   Low (<10%)

Consulting services	Cloud modernization services	Cloud infrastructure design/build services	Cloud operate services

Adoption by buyer group

High (>20%)   Medium (10-20%)   Low (<10%)

| Small (annual revenue < US$1 billion)	Medium (annual revenue = US$1-5 billion)	Large (annual revenue > US$5 billion)

Source: Everest Group (2020)

Wipro | system integrator capabilities on Microsoft Azure (page 2 of 5)
Capabilities on Azure overview

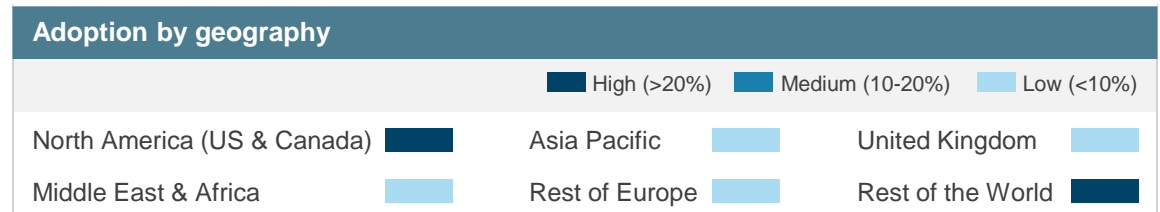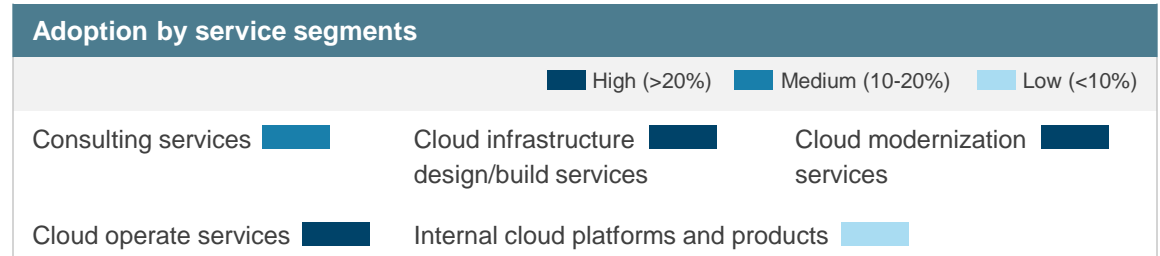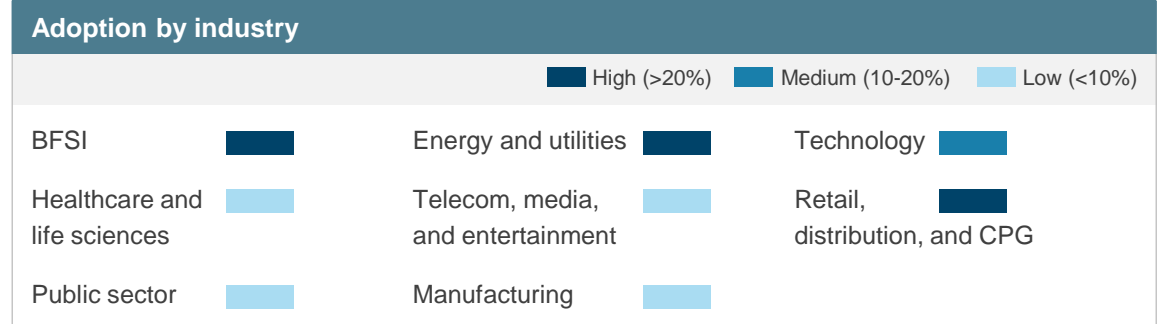**Azure partnership overview:**

Wipro is a gold partner of Microsoft Azure. It has formed a Microsoft Business Unit (MBU) to bring all the different Microsoft solutions and practices under one organization to bring an integrated view to its customers and partners. MBU is organized under three groups: Azure intelligent cloud, business apps, and modern workplace

Revenue from Azure-related services (2019)

<US$50 million	US$50-200 million	US$200-500 million	>US$500 million
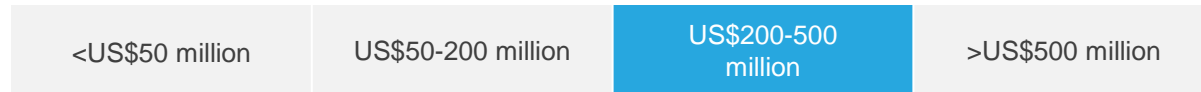
Azure portfolio – key highlights (representative list)

- Wipro has Microsoft Gold competencies including Application Development, Cloud Platform, Cloud Productivity, Collaboration & Content, Data Analytics, Datacenter, DevOps, Enterprise Resource Planning, Messaging, Security, and Windows & Devices. It also has SAP on Azure Advanced specialization
- Won "Partner of the Year 2020" for data estate modernization and application innovation categories by Microsoft
- Key use cases delivered on Azure include:
  - Connected vehicle platform
  - Industry-specific solutions including retail commerce, payer-in-a-box, and Open Standard Data Universe platform (OSDU) for the oil & gas industry
  - Industry 4.0 underpinned by digital twin technology
  - SmartiConnect (IoT data aggregation & integration platform)
  - Mainframe modernization

Adoption by industry

High (>20%)   Medium (10-20%)   Low (<10%)

BFSI	Energy and utilities	Technology
Healthcare and life sciences	Telecom, media, and entertainment	Retail, distribution, and CPG
Public sector	Manufacturing	

Adoption by service segments

High (>20%)   Medium (10-20%)   Low (<10%)

Consulting services	Cloud infrastructure design/build services	Cloud modernization services
Cloud operate services	Internal cloud platforms and products	

Adoption by geography

High (>20%)   Medium (10-20%)   Low (<10%)

North America (US & Canada)	Asia Pacific	United Kingdom
Middle East & Africa	Rest of Europe	Rest of the World

Wipro | system integrator capabilities on Microsoft Azure (page 3 of 5)
Key solutions

Proprietary solutions (representative list)	
Solution name	**Details**
Cloud Native Product Studio (CNPS)	CNPS is a framework of components based on a container management platform (Kubernetes), which has ready-to-use components that enhance application functionality with Non-Functional Requirements ((NFRs) needed on a Cloud/on-premise container environment
Run Ops automation solution	Automation solution for cloud operations for cloud-hosted products & platforms
Enterprise Digital Operation Center (EDOC)	EDOC is used to provision, configure, secure, monitor, and manage workloads through a single pane of glass
SNIPE	AI-powered BI transformation accelerator that supports platform migration, rationalization, and modernization, leveraging rich artefact libraries.
Track and Trace	Smart Track and Trace solution from Wipro addresses the indoor and outdoor tracking challenge faced by multiple industries
Wipro CARG (Cloud Application Risk Governance)	A platform that provides real-time application risk posture view, provides regulatory and compliance view for each application, detects potential security issues in cloud-based business application, and recommends base security controls needed for application protection in cloud based on business, compliance, and regulatory requirements
Cloud trust	Wipro CloudTrust service is a comprehensive lifecycle framework that addresses security challenges for enterprises adopting the cloud
Wipro devNXT	devNXT is a next-generation solution to enhance and speed up the application development lifecycle for cloud native applications
Cloud validation rig	End-to-end test solution for testing cloud-based applications
Digital Experience Platform (DXP)	A proprietary platform to provide connected CX across channels, devices, and domains. It provides insight-driven experiences by aggregating, transforming, and generating insights from different sources of data
Cloud Data warehouse Readiness solution (CDRS)	It helps enterprises scale their cloud data transformation initiatives by enabling smoother migration of data from on-premise data warehouses/databases to cloud-based data warehouse/database/big data technologies by patented migration framework
Boundaryless enterprise	A cloud management platform to manage IaaS and provide a single pane of glass across IaaS, PaaS, CaaS, and DevOps across private and public cloud
Application Modernization Toolkit (AMT)	AMT helps in tool and survey-based assessment for technical debt and effort estimation and provides auto-remediation with built-in eclipse plug-in

Wipro | system integrator capabilities on Microsoft Azure (page 4 of 5)
Case study, investments, and recent activities

Case study	
Business transformation through cloud-only strategy	
Client	The client is the largest plant-based consumer packaged goods company in the world
Business challenge	During divestiture from the parent company, the client was required to rebuild their entire IT infrastructure from the ground up. Some of the key challenges were to create an agile, scalable, and secure IT system & process, and redesign the complete IT infrastructure to meet future business needs, maintain aggressive transition timelines of eight months TSA with the parent company, and manage and scale global operations without disrupting the customer experiences because of the divestiture.
Solution	Wipro took ownership to redesign, develop, deploy, and implement IT infrastructure solutions. The team of experts first evaluated the requirements of the technology environment and then designed and built an Azure platform in just four months. Key features of the solution are: ● Adoption of a cloud-only strategy with Azure as target cloud – SAP S4 HANA BASIS Services on Azure, built on MigMan suite of framework ● Plug-and-play Enterprise Digital Operations Center (EDOC) platform for management, monitoring, and cost optimization
Impact	● Enhanced customer experience through containerization and cloud native capabilities ● Successful transition upholding TSA exit timeline of eight months. Along with it, provided tight API-based integration with Azure cloud native services and enabled steady state operations in just two months ● Achieved three times faster release velocity with "cloud only" approach, with 100% applications and services on Azure, leading to five times speed-to-market ● Enabled digital operations and optimized costs in just two months through "Plug and Play" EDOC platform

Recent investments and activities (representative list)	
Development	**Details**
IPs, tools, and domain solutions	NetOxygen (enterprise loan origination system), Open Banking API, ColdChain (pharma supply chain), Promax (trade promotion & optimization), MIQ (manufacturing intelligent analytics platform), Smart Twin (closed loop performance management)
Innovation centers	Microsoft Cloud Studio: Multi-disciplinary co-innovation center backed by Wipro cloud studio platform to build next-generation solutions leveraging all three Microsoft clouds (intelligent cloud, modern workplace, and business applications)
COVID-19 offerings on Azure	● Wipro Live Workspace: Provides practical business continuity services, powered by Microsoft Intune, that allows enterprises to rapidly design, deploy, and manage Bring Your Own Device (BYOD) solutions across their user base ● Microsoft Teams – Rapid rollout framework: Series of frameworks that enable Wipro to quickly deploy the Microsoft collaboration, productivity, and security suites ● Wipro's Microsoft cybersecurity services: They provide a range of capabilities for digital identity, data security, endpoint security, cognitive security operations, and workplace security ● VirtualDesk™: Modernizing customers virtual apps and desktop deployments with Wipro's Virtuadesk and Microsoft's Windows Virtual Desktop (WVD) ● Azure expenditure rationalization: Strategic framework for cost reduction and optimization on Azure

Wipro | system integrator capabilities on Azure (page 5 of 5)
Everest Group assessment – Leader

Measure of capability: ● High ◐ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
◕	◕	◕	◔	◕	◔	◕	◑	◕

Strengths

- Wipro has developed extensive domain-centric solutions on Azure including pharma supply chain, enterprise loan origination system, and manufacturing intelligence analytics platform

- Investing in Microsoft Cloud Studio is helping it build next-generation technology solutions through co-innovation, with Microsoft covering business applications, workplace, infrastructure, data & analytics, and IoT

- Clients have appreciated the reliability of services, breadth of Azure services capability, and flexibility during project delivery

- With its business-first approach, Wipro is relevant for clients who are looking for cloud transformation. It brings in design-thinking approach, domain expertise, and knowledge on cloud providers

Areas of improvement

- As next steps, Wipro needs to focus on acquiring new Azure Gold competencies in areas such as cloud business applications, application integration, and project & portfolio management

- Wipro needs to further enhance its capabilities in Azure hybrid solutions such as Azure Stack and Azure Arc

- Its geographical coverage is centered primarily around North America and Europe. Needs to expand in the Asia Pacific market

- Clients have pointed that Wipro needs to improve in its project management capabilities, especially in large environments to reduce unanticipated delays in delivery commitments

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix
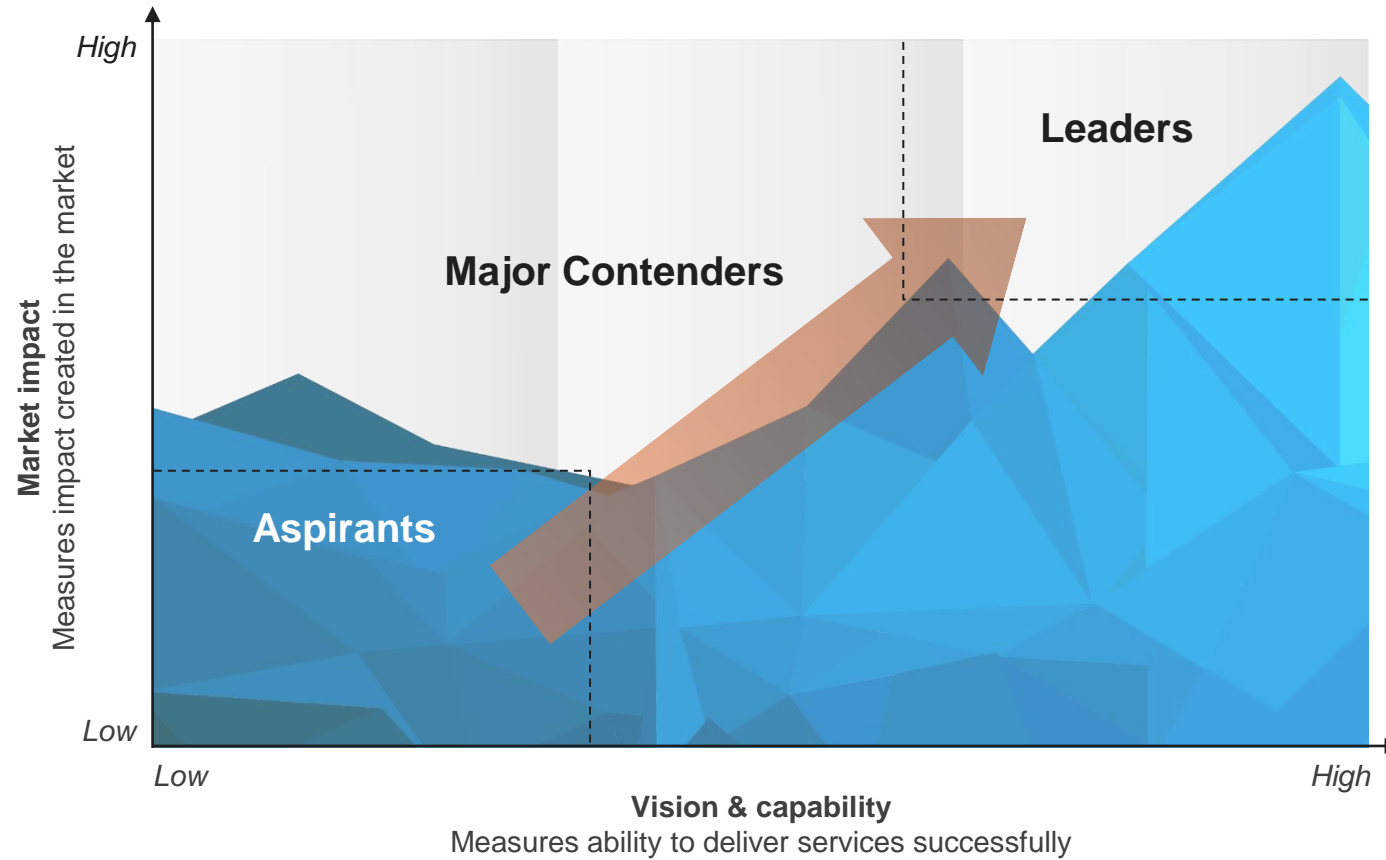
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability
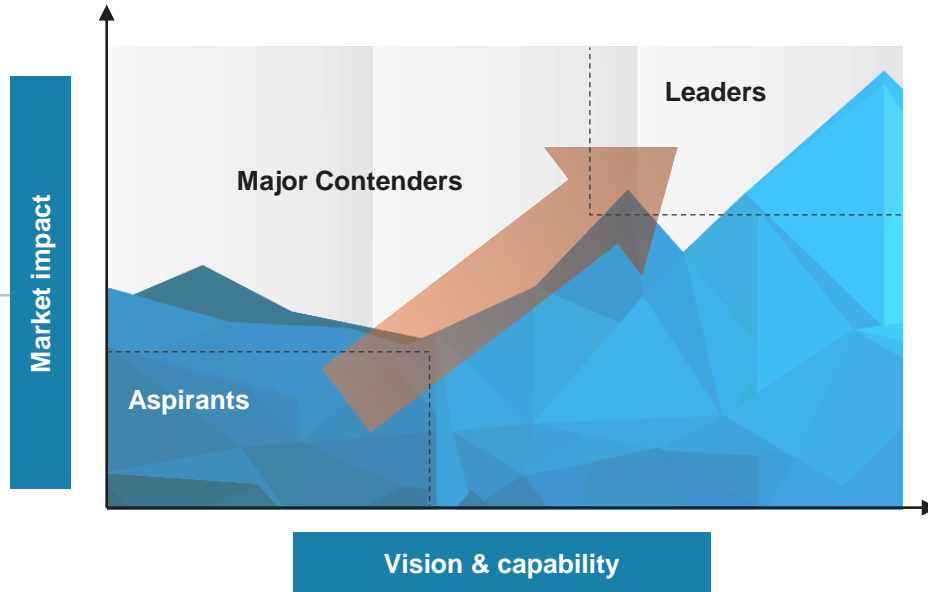
Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging system integrator / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class system integrators / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a system integrator / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  - Issue a press release declaring their positioning. See citation policies
  - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

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